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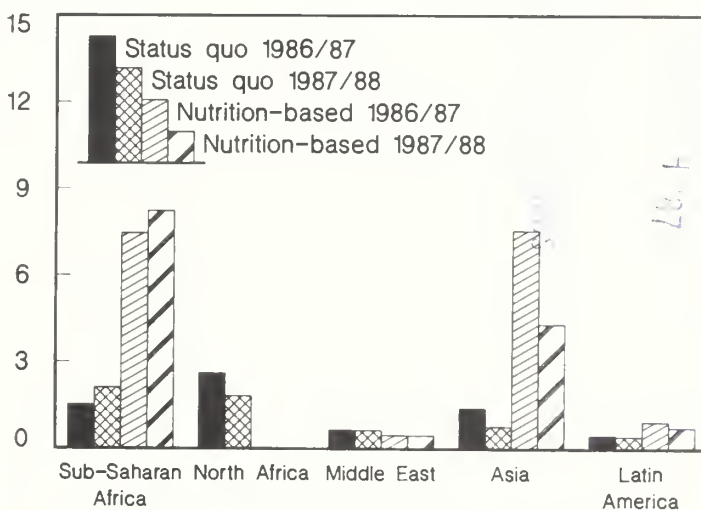
February 1987

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# World Food Needs and Availabilities, 1986/87: Winter Update

## Additional Food Needs Likely To Rise Only in Sub-Saharan Africa

Million tons



Cereal equivalent needs in excess of domestic production and commercial imports



## PREFACE

As a result of a Presidential Initiative in the summer of 1984, an Interagency Food Aid Analysis Working Group was established to provide the U.S. Government with the best possible food needs assessment for countries in the developing world. This report is prepared under the aegis of the Interagency Working Group.

An assessment of world food needs has serious implications for both donor and recipient countries, and it has the potential to influence the expenditure of many millions of dollars and affect the lives of many millions of people.

It is, therefore, very important that readers clearly understand the issues that the Food Needs and Availabilities report addresses, and those it does not. This report is not an allocation or programming document, but an objective analytical assessment of food needs. Allocation and programming decisions are made in other forums and consider factors in addition to the food needs assessed in this report.

The assessment of food needs presented herein refers to the amount of food needed to cover the difference between a country's domestic food production plus its commercial import capacity, and either of the following two alternative measures of food need.

The status quo need is based on a country's recently achieved levels of food consumption, while the nutrition-based need is based on FAO's published information on minimum recommended dietary intake for each country. In addition, an estimate is made of the maximum absorbable imports if the highest historical levels of per capita total food use and carryover stocks were to be maintained. This assumes the food delivery systems in most food-aid-recipient countries have been "at capacity" at the highest historical level. None of these measures, taken individually, adequately reflects the range of objectives embodied within P.L. 480 legislation, nor does any one measure capture all factors considered in allocation and programming decisions.

The food need levels reported are for the marketing years 1986/87 and 1987/88. As with any projection, assumptions must be made about future events. The assessment of food needs is based heavily upon projections of food crop production and financial ability to commercially import food. Food production is subject to the vagaries of weather and commercial import capacity is influenced by various international commodity and financial market conditions. Since neither weather nor international markets can be predicted with certainty, the food need levels contained in this report are subject to change.

To reflect current crop conditions and import capacity, each country is reviewed quarterly and an updated food needs level calculated for those countries judged to be facing conditions significantly different from those at the last assessment. For this reason, readers are encouraged to acquire current reports to keep abreast of changing food need levels. Readers are further advised that both the methodology and the data used in the calculations are continually being refined. This effort reflects the continuing commitment of the U.S. Government to respond more rapidly and adequately to the needs of those countries where food commodity assistance can be used for humanitarian purposes and in the mutual interests of the recipient country and the U.S. Government.

WORLD FOOD NEEDS  
AND  
AVAILABILITIES, 1986/87

WINTER UPDATE

FEBRUARY

1987



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## FOREWORD

This is the second update to World Food Needs and Availabilities, 1986/87. It includes current regional summary reports and revised reports for the 12 countries having significantly changed needs. The final update to the report will be published in May 1987.

The annual reports and supplements serve both the requirement of P.L. 480, as amended, that "global assessments of food production and needs" be submitted to the Congress, and the food needs analysis function of the Interagency Food Aid Analysis Working Group. Information provided through these reports to the Executive Branch and the Congress is employed along with other information in making tentative fiscal 1987 and 1988 food aid budget allocations. The main report and the supplements are also intended to provide detailed updates on food supplies and additional food needs on both a country-by-country and a world basis. This information is also useful to program and policy officials within donor governments and food-aid-recipient countries, analysts in international organizations and universities, and private agencies involved in food aid distribution. The assembly and maintenance of data for the analysis of food needs is a joint effort of the U.S. Agency for International Development (AID) and USDA.

This report presents two alternative measures of the overall food import requirements (commercial plus concessional) and the additional food needs of each country for 1986/87 and 1987/88. The status quo and nutrition-based assessments are based on two different sets of normative judgments and assumptions regarding the role of additional food and the considerations that might govern its use. The basic assumption underlying the status quo assessment is that additional food would be needed to prevent food supplies, and hence consumption, from falling below recent levels. Meeting status quo food needs would in principle stabilize per capita use by filling shortfalls in domestic production and import capacity. The nutrition-based assessment addresses the continuing problem of undernutrition in many of the developing countries. The assumption is that additional food would be needed to close the gap between food availabilities and an internationally accepted minimum nutritional standard. The nutrition-based estimates thus provide an aggregate measure of the nutritional gap, net of recipient countries' capacity to import food commercially. Calculation of zero nutrition-based food needs does not mean all citizens have a nutritionally adequate diet. In developing countries, poor nutrition is frequently the consequence of poor income distribution.

Status quo food needs assessments are stabilized by the method of estimating annual base period per capita food use. Base period food use is calculated as the mean of the most recent 4 years that deviate less than one standard deviation from the mean of the most recent 8 years of record. The method is explained in the Methodological Notes section of the August 1986 report. Appendix A to the May, 1986 report presents the results of an assessment employing both the present and the earlier method of calculating base period per capita food use.



The most current available weather, crop production, and financial data were employed in making 1986/87 estimates. Food availability for 1987/88 is estimated from initial indications of planting intentions and from historical production. With new or changed crop information, production and additional food needs estimates change, sometimes sharply. The quarterly reports issued through the year provide users with assessments based on current weather and crop information. Current updates of assessments on individual countries are available from the Economic Research Service.

Estimates of commercial import capacity assume the continuance of recent experience in debt payment, and thus the availability of foreign exchange for commercial food purchases. Significant changes in debt payment performance would alter food import capacity and additional food needs.

Neither the status quo nor the nutrition-based food needs measures deals specifically with the ability of a country's infrastructure to absorb food aid without overloading port and transportation capacity, and storage and distribution systems. The maximum absorbable food imports assessment frequently limits the quantity of nutrition-based needs that can physically be provided. The "gap" between maximum absorbable and nutrition-based food needs is one measure of the seriousness of a country's food problem. In a very real sense, the magnitude of the task of achieving the financial and physical capacity to import food, or increasing domestic food production consistent with national food demand, is captured by this measure.

The import requirements and additional food need estimates in World Food Needs and Availabilities reports are based on national agricultural and economic data. These estimates assist financial and logistics planning by both donor and food aid recipient countries. It should be apparent, however, that additional food need levels are only a part of the calculus, and that delivering imported food to the communities that are deprived by national food production shortfalls or civil disturbances is a major undertaking. Factors bearing on success include local transportation and communications infrastructure, the financial status of both local and national public service agencies, and the availability of international financial support. The quarterly assessments of additional food needs are intended to add to the information available so that food and complementary financial and technical assistance can be made available in a timely fashion.

Ray W. Nightingale  
Food Needs Analysis Coordinator

## ACKNOWLEDGMENTS

Ray Nightingale directed the overall planning and preparation of the report. Regional coordination within the Economic Research Service was performed by: Margaret Missiaen (Africa and the Middle East), Rip Landes (Asia), and Chris Bolling (Latin America). Suzanne Marks monitored operation of country estimation modules and ran the regional analysis and the document preparation module.

The International Economics Division economists providing analysis for the report included: Chris Bolling, Richard Brown, Brian D'Silva, Gary Ender, Albert Evans, Amjad Gill, Rip Landes, Margaret Missiaen, Peter Riley, Nydia Rivera-Suarez, Leslie Ross, Dave Skully, Mark Smith, Fawzi Taha, and Larry Witucki. Dee Linse contributed for the Foreign Agricultural Service.

Richard Shelton provided support in running the country food needs model. Secretaries who helped prepare the report included Betty Acton, Rhodia Ewell, Jamesena George, Lori McPherson, and Alma Young.

Interagency Food Aid Analysis Working Group reviewers for the Agency for International Development included Patricia Rader, Food and Voluntary Assistance, Henry Merrill, Africa Bureau, Don Sillers, Asia-Near East Bureau, Howard Steele, Latin American Bureau. Ross Quan and Scott Danaher reviewed the report for the Department of State.

Reviewed and approved by the World Agricultural Outlook Board.

## SUMMARY

The detailed country tables and narratives in this report include information on the quantities and dollar values of assessed additional food needs, including the need for cereals, pulses, vegetable oils, and dairy products. This summary covers just additional need for cereal, the principal commodity employed in international food aid. Food needs assessments for 1986/87 and 1987/88 are based on information available in mid-January 1987.

The overall, and the regional levels of food needs are little altered by the current assessment. Reports are present on just 12 countries in which there were significant changes.

### Assessed cereal needs in 1986/87

Status quo cereal shortfalls for 1986/87 in 69 developing countries are estimated at 6.7 million tons, up only 200,000 from the November estimate and about 2.1 million below estimated needs for 1985/86.

In Sub-Saharan Africa, status quo cereal needs for 1986/87 are placed at 1.5 million tons. Needs continue to be greatest in Southern Africa at 510,000 tons, and in East Africa, where Ethiopia requires 356,000 of the 583,000-ton total. Needs in West Africa are estimated at 278,000 tons. For all of Sub-Saharan Africa, requirements are down 57,000 from the November estimate, whereas in North Africa, needs are up 184,000 tons.

Status quo needs in Asia, at 1.4 million tons for 1986/87, are down 130,000 tons since November. South Asia dominates with Bangladesh having needs of 478,000 tons and Nepal 214,000. Latin American status quo requirements, assessed at 477,000 tons for 1986/87, remain unchanged.

The 69 countries are estimated to be short 16.4 million tons of cereals to meet minimum nutritional standards in 1986/87. Nutritional needs are greatest in South Asia at 7.2 million tons and East Africa at 4 million tons. Maximum import capacities of 3.4 and 2.7 million tons, respectively, result from limited storage and internal transportation in these countries.

When requirements for cereal stock adjustments are added to needs for consumption, total status quo needs are 7.9 million and nutrition-based needs are 17.3 million tons. North Africa has the greatest status quo stock needs.

Status quo additional food needs have continued to decline as the food situation improves or stabilizes in Africa. This is consistent with the definition of status quo additional food needs. Nutritional needs are also minimal in some countries, but have continued high in others and increased in a few. Thus, emergency or disaster assistance needs are less likely. Resources might be used to address inadequate agricultural production and commercial import capacity, low family income levels that inhibit food purchases, and other problems. In countries without assessed

nutritional needs on an aggregate national level, many people often need help to achieve food consumption adequate for health and the energy to be productive.

#### Assessed cereal needs in 1987/88

In 1987/88, total status quo cereal needs for consumption are assessed at 5.8 million tons, down 892,000 from 1986/87. Nutrition-based needs, at 13.8 million, are down 2.7 million from 1986/87. The maximum absorbable for all countries is assessed at 10.3 million tons, down 700,000 from November. The May issue of this report will give more detailed food needs assessments for 1987/88.

Additional cereal needs to support consumption, stocks adjustments,  
and maximum absorbable cereal needs

Region	Status quo		Nutrition-based		Maximum 1/ + stocks
	Consumption	Consumption + stocks	Consumption	Consumption + stocks	
-----Thousand tons (cereal equivalent) 2/-----					
1984/85					
Total	11,745	13,450	25,767	27,472	3/
1985/86 4/					
Total	8,811	9,503	20,253	21,036	15,014
1986/87					
Total	6,693	7,918	16,448	17,293	13,521
Africa	4,150	5,137	7,465	7,972	8,304
North Africa	2,623	3,382	0	0	3,382
Sub-Saharan Africa	1,527	1,755	7,465	7,972	4,922
West Africa	278	356	1,417	1,501	804
Central Africa	156	167	312	324	324
East Africa	583	722	3,992	4,258	2,657
Southern Africa	510	510	1,744	1,889	1,137
Middle East	650	738	473	562	562
Asia	1,416	1,438	7,564	7,680	3,692
South Asia	1,284	1,306	7,247	7,363	3,375
Southeast Asia	132	132	317	317	317
Latin America	477	605	946	1,079	963
Caribbean	89	142	167	196	184
Central America	379	444	564	640	622
South America	9	19	215	243	157
1987/88					
Total	5,801	6,136	13,775	14,109	10,257

1/ Imports consistent with maximum recent levels of consumption and food stocks. 2/ Major cereals, and the cereal equivalent of shortfalls in roots and tubers. 3/ Maximum absorbable needs not computed in 1984/85. 4/ Final 1985/86 assessment, May 1986 World Food Needs and Availabilities report.



## Food Aid Availabilities and Outlook

The Food and Agriculture Organization (FAO) expects world cereal aid in the July 1986–June 1987 trade year to be about 10.8 million tons. This is a very slight decline from the 1985/86 season, but is more than 10 percent below peak levels achieved in response to the African famine. Principal donors are the United States, the European Community (EC), Canada, and Australia.

At the end of September 1986, pledges to the UN/FAO World Food Program for the 1987–88 biennium were almost \$625 million against a target of \$1.4 billion. Pledges to the 1985–86 biennium were about \$1.1 billion against a \$1.35-billion target.

As of October 16, 1986, cereal contributions of about 540,000 tons to the 1986 International Emergency Food Reserve (IEFR) again surpassed the 500,000-ton target. The principal donor was the United States, followed distantly by Australia, the EC, and Sweden. The IEFR, administered by the World Food Program, was established in 1975 by the United Nations as a means to ensure resources to help meet food emergencies. In 1984 and 1985, about 120,000 tons and 190,000 tons of cereals, respectively, were channeled specifically for the African famine. Significant amounts of commodities are also channeled for Afghan refugees.

In the United States, the Administration has proposed a budget for the October 1987–September 1988 fiscal year in which the volume of Public Law (P.L.) 480 food aid would decline by about 5 percent to 7.8 million tons. The actual P.L. 480 budget will depend on Congressional action.

Australia has applied to join the 1986 Food Aid Convention (FAC) with the reservation to pledge 300,000 tons of cereal aid. The Australian pledge under the 1980 FAC was 400,000 tons. Domestic economic difficulties have reduced the capacity to provide assistance to other countries in the form of food aid. It is expected though that Australia will exceed the 1986/87 pledge by at least 50,000 tons.

The objective of the FAC, part of the International Wheat Agreement, is to ensure the achievement of the World Food Conference target of at least 10 million tons of food aid provided in the form of cereals suitable for human consumption. Members pledged to provide 7.6 million tons of cereal aid under the 1980 FAC. Pledges are expected to closely follow that level under the 1986 FAC.

## Commercial Capacity To Import Food

Several alternative methods are available to convert general financial indicators into measures of the low-income countries' capacity to import food. The calculation used in this study is based on estimates of each country's foreign exchange earnings, import bills, foreign exchange reserves and debt service, and historical commercial food import patterns and food import unit values. Estimates of a country's foreign exchange earnings were made on the basis of export trade forecasts and, in selected cases, other sources of earnings such as worker remittances and tourism. The foreign exchange earnings estimate was added to estimates of a country's foreign exchange reserves to arrive at total foreign exchange supplies. The total was then adjusted using historical and estimated import bills to maintain the country's historical reserves-to-imports ratio.

The adjusted foreign exchange availability estimate was reduced further by the country's debt-service obligations to arrive at a net foreign exchange availability. The proportion of this net foreign exchange availability allocated to commercial food imports in the base period was held constant and used to calculate the foreign exchange available in the forecast period for commercial food imports. The volume of imports that could be purchased is estimated using this final estimate of net foreign exchange availability and expected food import unit values.

### Measures of Additional Food Needs

#### Conceptual Framework

The financial indicators noted above and the food data described below are used to generate two alternative measures of food needs in addition to estimated commercial import capacity. Countries must choose between making extraordinary commercial purchases and seeking food aid to fill this gap. However, extraordinarily large commercial imports, particularly in successive years, would be at the cost of other imports, including imports of development goods. In addition, a measure is computed of the maximum quantities of commodities which countries could feasibly import. Each measure highlights a different aspect of the food problem in the low-income countries and a different notion of the role aid might play in easing the problem. For a more detailed discussion, see the section entitled "Methodological Notes."

The first measure, termed "status quo," estimates the additional food needed to maintain per capita use of food staples at levels reported in recent years. Per capita food use is calculated as the mean of the most recent 4 years that do not deviate more than one standard deviation from the mean of the most recent 8 years. This per capita food use is called base-use in the following descriptions of tables and elsewhere in this report. The data years employed in calculations for this report are 1978/79 through 1985/86. No provision is made either for improving substandard diets, for reducing allocations to

countries where diets are relatively good, or for correcting problems related to the uneven distribution of food across or within countries. Because status quo estimates support a level of per capita availability that has been achieved in the past, in most cases they can be considered to be consistent with the capacity of countries to absorb food imports.

The second measure, termed "nutrition-based," estimates the additional food required to raise per capita caloric intake to the levels associated with FAO's recommended minimum diet. This measure is based on the notion that food aid might be utilized in a way consistent with nutritional need rather than to maintain a recent, possibly substandard, status quo. In this sense, the nutrition-based measure might be viewed as a maximum level of additional food need, but not necessarily consistent with a country's ability to absorb food imports.

The measure of food import feasibility called "maximum absorbable imports" provides one basis for assessing what maximum quantity of additional food might be imported toward meeting large nutrition-based food needs, or possibly for building stocks in a period of ample world food supplies. The implicit assumption is that the food delivery systems of many of the countries involved have been fully "loaded" by past high levels of consumption. In addition, the highest level of stocks maintained over the previous 8 years is assumed, in the absence of better information, to be the largest level that can currently be maintained. The estimate is intended to provide a crude measure of the amount of food that can be physically absorbed. This level may then be used to scale back nutrition-based additional food need estimates that may be beyond the physical limits of a country's transportation, distribution, and storage capabilities.

While the status quo and nutrition-based methods differ in the estimation of requirements, they have a common structure. In each, an estimate of every country's domestic supplies of food staples is subtracted from an estimate of staple food requirements to arrive at a quantity estimate of import requirements. Import requirements are then totaled for food groups, based on assumptions regarding their substitutability. An estimate of a country's capacity to commercially import food in each category is then subtracted from the import requirement to arrive at an estimate of additional food needs. Estimated import unit values for each food group are used to generate import requirements, and additional food needs estimates in both quantity and value terms.

Several factors affecting additional food needs in a country are not addressed in these estimates. First, food distribution problems---both geographical and across income or population groups---are overlooked by the use of national level food availability and country average food requirement measures. These can mask acute shortages in specific places within a country as well as uneven distribution of food across population groups. However, measuring the unevenness of food distribution is extremely difficult, because data are not available. Acute problems of this nature are treated qualitatively in the country narratives.

Second, additional food needs are estimated without reference to a country's food and agriculture policies and current performance. Although these issues figure



importantly in a country's choice between exceptional commercial food purchases and requesting concessional food imports, a comprehensive consideration of them is beyond the scope of this report.

### Introduction to Regional and Country Narrative Tables

The following section reports on the food and financial situation and outlook for 69 countries in Africa, the Middle East, Asia, and Latin America. The materials summarize events during the 1985/86 local marketing year (generally July–June) and project food and financial conditions for 1986/87 and 1987/88.

Data shown in the tables must be interpreted with caution. Forecasts of food production, population, and financial conditions for 1986/87 and 1987/88 represent ERS's forecasts of what is likely to happen during those years. But, 1986/87 and 1987/88 estimates of all other items—stocks, use, import requirements, and additional needs—are not forecasts of what is likely to happen; they are targets derived using the status quo and nutrition assumptions summarized in the previous section, and explained in detail in the "Methodological Notes" section of this report. Additional food needs calculations are also subject to a number of adjustments detailed in the Methodology section.

In each of the regional and country tables, any quantity less than 500 tons and any value less than \$500,000 is shown as zero.

#### Tables entitled "[Region] basic food data"

These tables provide major cereal supply and utilization data and population for regions for 1980/81–1985/86 and for forecast years (1986/87–1987/88).

#### Tables entitled "[Region] cereal use, additional food needs to support consumption, and stock adjustment

These tables deal only with 1986/87–1987/88 country estimates aggregated for the regions. The explanation for column headings is the same as for column headings in the country tables, as described below.

#### Tables Entitled "[Country] basic food data"

These tables provide food staple supply and utilization data for 1980/81–1985/86 and for forecast years (1986/87 and 1987/88). An explanation of each column heading follows:

1. Actual or forecast production--actual production for the individual staples for 1980/81–1985/86 and forecast production for 1986/87 and 1987/88.
2. Net imports--actual net imports during 1980/81–1985/86. Net import figures for forecast years are not supplied. Instead, estimated import requirements based on status quo and nutrition-based approaches are provided in the next set of tables.

3. Nonfeed use--actual human consumption, 1980/81-1985/86.
4. Feed use--actual feed use, 1980/81-1985/86 and targeted feed use for 1986/87 and 1987/88. Targeted feed use is calculated to maintain per capita feed use at base-use levels. The same base-use level of feed use is employed in the status quo and nutrition-based estimates of aid needs.
5. Beginning stocks--actual stocks for 1980/81-1985/86, where reliable stocks data are available. Initial calculations of status quo and nutrition-based import and aid needs are done by maintaining the ending stocks for 1985/86 (beginning stocks 1986/87) constant throughout the forecasting period. Import requirements for building food security stocks are calculated subsequently for the countries for which stock data are available.
6. Per capita total use--actual per capita human consumption and livestock feed use for 1980/81-1985/86.
7. Commodity coverage--the food staples included for each country.
8. Share of diet--each staple's share of total daily caloric intake, and the share of total daily caloric intake covered by the food staples analyzed. Data are drawn from the 1979-81 FAO Food Balance Sheets with adjustments made in some cases for differences in FAO or ERS estimates of feed use or more recent significant changes in a staple's share of the diet.

#### Tables Entitled "Import requirements for [Country]"

These tables deal only with 1986/87 and 1987/88 estimates. An explanation of each column heading follows:

1. Forecast domestic production --data are drawn from the "basic food data" tables.
2. Total use, status quo--total amount of a staple needed to maintain per capita human consumption at the base-use level and feed use at the targeted level.
3. Total use, nutrition-based--the amount of a staple needed to support FAO recommended minimum daily per capita caloric intake levels and targeted feed use.
4. Import requirements, quantity, status quo--the imports of a staple required to maintain per capita consumption, and also to achieve the targeted levels of feed use with no change in stocks, as shown in the basic food data table. These estimates are calculated for each staple by subtracting forecast domestic production from status quo-based total use.



Subtotals for each commodity group are calculated by summing the import requirements for individual commodities. Calculated surpluses (negative import requirements) for individual commodities within groups are subtracted from deficits in other commodities because foods are assumed to be substitutable within groups. Noncereals such as roots and tubers are converted to caloric wheat equivalents before being summed. Negative subtotals are shown as zeros because these calculated surpluses are assumed not to be substitutable elsewhere in the diet.

5. Import requirements, quantity, nutrition-based--the imports of a staple required to support recommended minimum per capita caloric intake, and targeted feed use, as no change in stocks is shown in the basic food data tables. These estimates are calculated by subtracting forecast domestic production from nutrition-based total use. Totals for each commodity group by year are computed as described in (4) above.
6. Import requirements, maximum--the largest quantity that could be managed if countries wished to take the greatest advantage of low grain prices to improve stocks or to improve on the nutritional status of the population.

Tables Entitled "Additional food needs for [Country], with stock adjustment and as constrained by maximum absorbable imports"

These tables provide calculations of cereal import requirements and food needs in excess of normal commercial imports resulting from consumption requirements and from estimates of cereal stock adjustments required for food security purposes. The estimated stock increment (quantity and value) is added to import requirements and additional food needs to support consumption to arrive at total import requirements and additional food needs. The stock increment is shown only when it results in altered total additional food needs (i.e. when not offset by negative additional food needs for consumption). For a discussion of how stock increment estimates are calculated, see "Methodological Notes" in the annual report.

1. Commercial import capacity--an estimate of the amount of food within each group that a country can afford to import commercially without reducing below historical levels the share of its available foreign exchange used for nonfood imports. Countries are assumed in forecast years to spend the same proportion of available foreign exchange on commercial food imports as in the base period. The measure is sensitive to historical and projected levels of foreign exchange holdings, total merchandise imports and exports, and debt service. The measure is provided in both quantity and value, using the same country-specific estimates of unit import costs as in the import requirements estimate.

2. Additional food needs, quantity--the estimated quantity of additional food needed in each commodity group to support either the status quo or nutrition-based use level and targeted stock and feed use levels. Negative needs are shown as zero.
3. Additional food needs, value--the estimated value of the additional food needed in each commodity group to maintain either status quo consumption or nutrition-based consumption and targeted stock and feed use levels.

Tables Entitled "Financial indicators for [Country],  
actual and projected"

These tables give historical data and forecasts for four key financial indicators: yearend international reserves, merchandise exports, merchandise imports, and debt-service obligations. All data are on a calendar year basis and are compiled from a variety of sources, including the World Bank, the International Monetary Fund, Chase Econometrics, country sources, and ERS estimates.

North Africa

The grain crop in North Africa is generally planted after the arrival of rain in October and November. This year timely and plentiful rain allowed for good planting conditions. In Tunisia, precipitation was adequate through December. In Morocco, precipitation has been light since mid-December and, if this persists, could stunt plant growth. It is premature, however, to forecast a below-average harvest for Morocco because good rainfall during the heading stage--late March through May--could still yield an excellent crop.

In Egypt virtually all grain is irrigated. There is no significant change in plantings or in Nile River levels, and this year's harvest is expected to remain on trend.

It is not yet clear how the severe cold weather in Europe during mid-January will affect germinated plants in North Africa. Given all available information, crop forecasts for this quarter remain unchanged from last quarter. Changes in additional needs are the result of changes in commercial import capacity caused by international commodity prices changes.

## North Africa basic food data

Commodity/year	: Actual or forecast production :	: Begin- ning stocks :	: Net imports :	: Popula- tion :	: Per capita total use
	:	:	:	:	:
	:	-----1,000 tons-----		Thousand	Kilos
Major cereals	:				
1980/81	:	12,893	3,336	9,303	69,169      322
1981/82	:	10,679	3,257	11,091	71,074      311
1982/83	:	13,734	2,953	9,351	72,972      323
1983/84	:	12,262	2,435	11,821	74,926      321
1984/85	:	12,470	2,367	12,770	76,901      325
1985/86	:	13,907	2,582	12,495	78,910      326
1986/87	:	14,466	3,242		81,077
1987/88	:	14,166	3,242		83,303
	:				

The absence of a column entry in any table means such entry is inapplicable.

North Africa cereal use, additional food needs to support consumption, and stock adjustment

Commodity/year	Total use		Additional needs			
	Status quo	Nutrition-based	Status quo	Nutrition-based		
			Quantity	Value	Quantity	Value
	1,000 tons	1,000 tons	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent						
Consumption						
1986/87	26,007	22,193	2,623	404	0	0
1987/88	26,718	22,696	1,830	282	0	0
Stock adjustment						
1986/87			795	124	88	10
1987/88			156	20	73	8
Total						
1986/87			3,382	524	0	0
1987/88			1,913	295	0	0

## West Africa

Grain production in West Africa reached a record in 1986/87, slightly above the one set the previous year. These record crops have allowed replenishing of stocks, and lowering of imports. Per capita total use, however, is below the early 1980's. Grain output is expected to decline in 1987/88 if weather conditions are less favorable. Locusts are likely to be a threat again during the 1987 growing season. One adverse consequence of increased production has been a sharp drop in prices received by farmers, who may reduce area planted in 1987.

## West Africa basic food data

[illegible]

### West Africa cereal use, additional food needs to support consumption, and stock adjustment

Commodity/year	Total use		Additional needs			
	Status quo	Nutrition-based	Status quo	Nutrition-based		
			Quantity	Value	Quantity	Value
	1,000 tons	1,000 tons	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent						
Consumption						
1986/87	16,485	18,308	278	47	1,417	264
1987/88	16,978	18,754	451	73	1,670	298
Stock adjustment						
1986/87			76	14	76	14
1987/88			61	9	61	9
Total						
1986/87			356	61	1,501	279
1987/88			498	81	1,724	307
Maximum absorbable						
Cereal equivalent						
1986/87			356	61	804	139
1987/88			498	81	916	155



## BURKINA

Current reports indicate that Burkina harvested another record grain crop in 1986/87. The sharp increase--up more than 500,000 tons from the August report--means that Burkina will have a grain surplus in 1986/87. The surplus is almost entirely millet and sorghum and cannot be used to completely offset the structural deficit in wheat and rice. Even within the country, certain regions will have inadequate food supplies, requiring that grain be moved from other areas. Two years of good harvests indicate that there are large carryover stocks.

## Burkina basic food data

Commodity/year	Actual or forecast	Begin- ning	Net	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity: Share coverage :of diet
		1,000 tons				Kilos	Percent
Major cereals							
1980/81	1,029	0	65	1,090	4	178	Wheat 1.6
1981/82	1,250	0	87	1,284	3	205	Rice 3.6
1982/83	1,186	50	82	1,266	2	198	Millet and
1983/84	1,091	50	139	1,228	2	187	sorghum 56.1
1984/85	1,105	50	174	1,277	2	190	Corn 8.1
1985/86	1,559	50	70	1,427	2	207	Total 69.5
1986/87	1,879	250					
1987/88	1,645	250					

## Import requirements for Burkina

Commodity/year	Production	Total use		Import requirements		
		Status	Nutrition-	Status	Nutrition-	
		quo	based	quo	based	Maximum
Major cereals		----- 1,000 tons -----				
1986/87	1,879	1,386	1,610	(492)	(268)	(403)
1987/88	1,645	1,425	1,608	(220)	(37)	(129)

# Financial indicators for Burkina, actual and projected

Year	:	Exports	Imports	Debt	:	Foreign exchange available	
	:	and other	and other	service	:	International:	Share to major
	:	credits	debits	due	:	reserves	food imports
	:	----- Million dollars -----				Percent	
1980	:	161	368	17	:	68	144
1981	:	159	348	15	:	71	144
1982	:	126	360	18	:	62	109
1983	:	126	262	16	:	85	110
1984	:	129	258	22	:	106	108
1985	:	127	264	27	:	140	101
1986	:	130	275	17	:	200	218
1987	:	130	300	17	:	200	210

## Additional food needs to support consumption for Burkina

Commodity/year	:	Commercial import capacity		Status quo		Nutrition-based	
	:	Quantity	Value	Quantity	Value	Quantity	Value
	:	1,000 tons	Million \$	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent	:						
Consumption	:						
1986/87	:	144	18	0	0	0	0
1987/88	:	145	18	0	0	0	0
Stock adjustment	:						
1986/87	:			(7)	(1)	(7)	(1)
1987/88	:			7	1	7	1
Total	:						
1986/87	:			0	0	0	0
1987/88	:			0	0	0	0

# CHAD

The 1986/87 estimate of grain production was increased to 670,000 tons, up more than 20 percent from the November report. Millet and sorghum production of 625,000 tons is only slightly below last year's record. While Chad is self-sufficient in total grains this year, structural deficits in wheat and rice will have to be met by imports, estimated at 35,000 tons. The fighting in northern Chad continues, and food aid is being supplied to refugees.

## Chad basic food data

Commodity/year	Actual or	Begin-				Per	1979-81
	forecast	ning	Net	Nonfeed	Feed	capita	Commodity: Share
	production	stocks	imports	use	use	total use	coverage :of diet
	1,000 tons				Kilos		Percent
Major cereals							
1980/81	647	0	32	679	0	153	Wheat 1.4
1981/82	548	0	61	609	0	134	Rice 3.8
1982/83	466	0	57	523	0	110	Corn 1.2
1983/84	490	0	89	529	0	107	Millet 47.7
1984/85	300	50	141	476	0	94	Cassava 7.2
1985/86	682	15	65	697	0	138	Total 61.3
1986/87	670	65					
1987/88	545	65					
Roots							
1980/81	185	0	0	185	0	42	
1981/82	191	0	0	191	0	42	
1982/83	197	0	0	197	0	41	
1983/84	200	0	0	200	0	41	
1984/85	170	0	0	170	0	34	
1985/86	200	0	0	200	0	40	
1986/87	205	0					
1987/88	210	0					

## Import requirements for Chad

Commodity/year	Production	Total use		Import requirements	
		Status quo	Nutrition- based	Status quo	Nutrition- based : Maximum
		1,000 tons			
Major cereals					
1986/87	670	671	908	1	238 130
1987/88	545	696	925	151	380 286
Roots					
1986/87	205	214	307	9	102 15
1987/88	210	223	319	13	109 19
Cereal equivalent					
1986/87	752	757	1,032	4	279 123
1987/88	629	786	1,053	157	423 268

# Financial indicators for Chad, actual and projected

Year	:	Exports	:	Imports	:	Debt	:		:	Foreign exchange available	
	:	and other	:	and other	:	service	:	International:	:	Share to major	
	:	credits	:	debits	:		:	reserves	:	Total	food imports
	:	----- Million dollars -----							:	Percent	
1980	:	71	:	55	:	2	:	5	:	69	13
1981	:	55	:	89	:	3	:	7	:	52	14
1982	:	52	:	83	:	0	:	12	:	52	7
1983	:	75	:	118	:	1	:	28	:	74	4
1984	:	112	:	129	:	10	:	44	:	102	3
1985	:	65	:	117	:	8	:	33	:	63	
1986	:	60	:	110	:	2	:	5	:	34	5
1987	:	65	:	110	:	3	:	5	:	38	5

Additional food needs to support consumption for Chad,  
and as constrained by maximum absorbable imports

Commodity/year	: Commercial import capacity :		Status quo		: Nutrition-based		
	: Quantity	: Value	: Quantity	: Value	: Quantity	: Value	
	: 1,000 tons	Million \$	1,000 tons	Million \$	1,000 tons	Million \$	
Cereal equivalent	:	:	:	:	:	:	
Consumption	:	:	:	:	:	:	
1986/87	:	5	1	0	0	274	47
1987/88	:	6	1	150	24	417	68
Stock adjustment	:	:	:	:	:	:	
1986/87	:	:	:	(2)	(0)	(2)	(0)
1987/88	:	:	:	2	0	2	0
Total	:	:	:	:	:	:	
1986/87	:	:	:	0	0	272	46
1987/88	:	:	:	153	25	420	68
Maximum absorbable	:	:	:	:	:	:	
Cereal equivalent	:	:	:	:	:	:	
1986/87	:	:	:	0	0	118	20
1987/88	:	:	:	153	25	262	43

## MAURITANIA

The grain production estimate for Mauritania has more than doubled since the August report, because of good rains at the end of the growing season. The revision reduced the import requirements below the commercial import capacity, leaving no additional food needs. Stocks are estimated at over 100,000 tons, but are not included in the tables because of a lack of historical data. Food aid commitments for 1986/87 are over 40,000 tons. Even though aggregate food supplies are adequate in Mauritania, some segments of the population still require assistance.

## Mauritania basic food data

Commodity/year	: Actual or forecast	: Begin- ning	: Net	: Nonfeed	: Feed	: Per capita	: 1979-81 Commodity Share
	: production	: stocks	: imports	: use	: use	: total use	: coverage of diet
	:	:	:	:	:	:	:
	: -----	: <u>1,000 tons</u>	: -----	:	:	: <u>Kilos</u>	: <u>Percent</u>
Major cereals	:	:	:	:	:	:	:
1980/81	:	46	0	158	204	0	136 :Wheat 16.0
1981/82	:	77	0	185	262	0	171 :Rice 14.1
1982/83	:	18	0	273	291	0	186 :Corn 1.2
1983/84	:	28	0	301	329	0	207 :Millet 17.0
1984/85	:	16	0	252	268	0	165 :Other grain .0
1985/86	:	52	0	180	232	0	140 : Total 48.2
1986/87	:	118	0				:
1987/88	:	40	0				:
	:						:

## Import requirements for Mauritania

Commodity/year	:	Production	Total use		Import requirements		Maximum
			Status quo	Nutrition-based	Status quo	Nutrition-based	
	:		----- 1,000 tons -----				
Cereal equivalent	:						
1986/87	:	118	259	273	141	155	231
1987/88	:	40	264	273	224	233	317



# Financial indicators for Mauritania, actual and projected

Year	:	Exports	:	Imports	:	Debt	:	: Foreign exchange available				
	:	and other	:	and other	:	service	:	International:	:	Share to major		
	:	credits	:	debits	:		:	reserves	:	Total	:	food imports
	:	----- Million dollars -----								:	Percent	
1980	:	196	:	321	:	30	:	140	:	166	:	18
1981	:	270	:	388	:	54	:	162	:	216	:	16
1982	:	240	:	448	:	40	:	139	:	200	:	25
1983	:	315	:	386	:	37	:	106	:	278	:	16
1984	:	294	:	323	:	42	:	78	:	252	:	20
1985	:	378	:	308	:	78	:	59	:	299	:	
	:		:		:		:		:		:	
1986	:	300	:	350	:	47	:	50	:	212	:	21
1987	:	300	:	350	:	47	:	50	:	212	:	21
	:		:		:		:		:		:	

## Additional food needs to support consumption for Mauritania

Commodity/year	:	Commercial import capacity		Status quo		Nutrition-based	
	:	Quantity	Value	Quantity	Value	Quantity	Value
	:						
	:	1,000 tons	Million \$	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent	:						
Consumption	:						
1986/87	:	217	34	0	0	0	0
1987/88	:	227	34	0	0	6	1

## SENEGAL

The estimate of grain production in Senegal was reduced again following official reports that the 1986/87 millet harvest would be only 550,000 tons, compared with 950,000 the year before. Estimated total grain output is put at 730,000 tons, a 100,000 reduction from the November report. Senegal's financial indicators were also revised to reflect lower world prices for vegetable oils. Peanut products provide 20 percent of Senegal's export earnings. Peanut oil prices averaged about \$575 per ton in 1986 compared with \$905 in 1985. Larger import requirements and lower import capacity resulted in additional food needs of 83,000 tons for 1986/87. Some improvement in grain production in 1987/88 would lead to lower additional food needs. Large carryover stocks could be used to fill part of the import requirement.

## Senegal basic food data

Commodity/year	: Actual or forecast	: Begin-ning : production	: stocks	: Net imports:	: Nonfeed use	: Feed use	: Per capita total use	: 1979-81 Commodity: Share coverage of diet
	:	:	:	:	:	:	:	:
	:	:----- 1,000 tons -----	:	:	:	Kilos	:	Percent
Major cereals	:	:	:	:	:	:	:	:
1980/81	:	645	150	494	1,214	0	211	Wheat 6.2
1981/82	:	884	75	499	1,283	0	216	Rice 26.4
1982/83	:	730	175	551	1,331	0	217	Corn 4.5
1983/84	:	485	125	675	1,229	0	194	Millet 26.0
1984/85	:	660	90	581	1,243	0	190	Total 63.2
1985/86	:	1,195	88	470	1,549	0	229	,
1986/87	:	732	204					
1987/88	:	785	204					
	:							

## Import requirements for Senegal

Commodity/year	Production	Total use		Import requirements		Maximum
		Status quo	Nutrition-based	Status quo	Nutrition-based	
Cereal equivalent						
			1,000 tons			
1986/87	732	1,496	1,442	764	710	869
1987/88	785	1,546	1,496	761	711	869

# Financial indicators for Senegal, actual and projected

Year	:	Exports	:	Imports	:	Debt	:	Foreign exchange available	
	:	and other	:	and other	:	service	:	International:	Share to major
	:	credits	:	debits	:	reserves	:	Total	food imports
	:	----- Million dollars -----						Percent	
1980	:	481	:	973	:	179	:	8	41
1981	:	511	:	1,009	:	90	:	9	33
1982	:	590	:	968	:	46	:	11	23
1983	:	569	:	880	:	57	:	12	26
1984	:	548	:	805	:	93	:	4	28
1985	:	536	:	773	:	89	:	5	28
1986	:	600	:	850	:	78	:	5	26
1987	:	600	:	900	:	78	:	5	26

## Additional food needs to support consumption for Senegal, with stock adjustment

Commodity/year	:	Commercial import capacity		Status quo		Nutrition-based	
	:	Quantity	Value	Quantity	Value	Quantity	Value
	:	1,000 tons	Million \$	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent	:						
Consumption	:						
1986/87	:	680	95	83	12	30	4
1987/88	:	712	95	49	6	0	0
Stock adjustment	:						
1986/87	:			(7)	(1)	(7)	(1)
1987/88	:			7	1	7	1
Total	:						
1986/87	:			76	11	23	3
1987/88	:			55	7	6	1

## Central Africa

No significant changes have occurred in the region's food situation since the previous report. Angola's food problems remain critical and mainly stem from civil strife. No abatement of fighting and disruption is anticipated in the short term. Food aid is important in Angola despite better commercial import capacity than many other African countries, but distribution is difficult because of the war.

## Central Africa basic food data

Commodity/year	: Actual or : forecast : production	: Begin- : ning : stocks	: : Net : imports	: : Popula- : tion	: Per : capita : total : use
	:	:	:	:	:
	:	:-----1,000 tons-----	:	: Thousand	: Kilos
Major cereals	:	:	:	:	:
1980/81	:	1,236	59	861	37,792
1981/82	:	1,241	60	829	38,757
1982/83	:	1,281	58	740	39,981
1983/84	:	1,292	51	666	41,006
1984/85	:	1,326	17	777	42,027
1985/86	:	1,373	33	705	43,198
1986/87	:	1,404	40		44,387
1987/88	:	1,462	40		45,608
	:	:	:	:	:

### Central Africa cereal use and additional food needs

Commodity/year	Total Use		Additional needs			
	Status quo	Nutrition-based	Status quo	Nutrition-based		
			Quantity	Value	Quantity	Value
	1,000 tons	1,000 tons	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent						
Consumption						
1986/87	8,708	8,850	156	26	312	51
1987/88	8,948	9,090	193	31	348	54
Stock Adjustment						
1986/87			12	2	12	2
1987/88			8	1	8	1
Total						
1986/87			167	28	324	53
1987/88			202	32	356	56

## East Africa

With favorable growing conditions in East Africa, the 1986/87 cereal harvest is a record, up 4 percent from 1985/86. Potential losses from pests, particularly locusts and grasshoppers, did not materialize. Regional status quo estimates of additional food needs for 1986/87 are 583,000 tons, up slightly from the November estimate. Of this, 358,000 tons are needed in Ethiopia, where food shortages continue despite favorable weather during 1986. Nutrition-based food needs of 4 million tons reflect especially large needs in Ethiopia and Kenya.

With the 1987/88 East African cereal harvest estimated at 19.5 million tons, and with commercial import capacity virtually unchanged, status quo additional food needs for 1987/88 are projected at 968,000 tons, unchanged from the November report.

Sudan's 1986/87 sorghum crop is expected to exceed last year's 3.6 million tons, and may approach 4 million tons. With a record crop, prices farmers receive for sorghum have dropped to the lowest level in over 6 years. Because of increased production of other export crops, foreign exchange earnings were estimated to have increased by 60 percent in 1986.

While agricultural recovery has begun, civil strife continues, making relief work difficult in southern Sudan. Food relief needs remain in the south, but the magnitude is uncertain because of the difficulty of obtaining accurate information.

### East Africa basic food data

	: Actual or	: Begin-	:	:	:	: Per
	: forecast	: ning	: Net	: Popula-	: capita	
	: production	: stocks	: imports	: tion	: total	
	:	:	:	:	:	: use
	:					
	: -----1,000 tons-----			Thousand	Kilos	
Major cereals	:					
1980/81	: 15,306	1,077	1,770	121,603	141	
1981/82	: 16,824	1,027	1,665	125,707	144	
1982/83	: 16,899	1,457	1,109	129,771	138	
1983/84	: 15,634	1,555	1,851	133,559	138	
1984/85	: 13,522	575	4,625	136,740	129	
1985/86	: 18,773	1,019	2,323	142,244	146	
1986/87	: 20,470	1,391		146,713		
1987/88	: 19,484	1,391		151,372		
	:					



East Africa cereal use, additional food needs to support consumption, and stock adjustment

Commodity/year	: <u>Total Use</u> :		: <u>Additional needs</u>			
	: <u>Status</u> : <u>Nutrition-</u>		: <u>Status quo</u> :		: <u>Nutrition-based</u>	
	: <u>quo</u> : <u>based</u>		: <u>Quantity</u> : <u>Value</u> :		: <u>Quantity</u> : <u>Value</u>	
	: :		: :		: :	
	: <u>1,000 tons</u>	: <u>1,000 tons</u>	: <u>1,000 tons</u>	: <u>Million \$</u>	: <u>1,000 tons</u>	: <u>Million \$</u>
Cereal equivalent	:	:	:	:	:	:
Consumption	:	:	:	:	:	:
1986/87	: 28,698	: 32,485	: 583	: 86	: 3,992	: 624
1987/88	: 29,607	: 33,292	: 968	: 165	: 4,506	: 697
	:	:	:	:	:	:
Stock adjustment	:	:	:	:	:	:
1986/87	:	:	: 445	: 71	: 445	: 71
1987/88	:	:	: 168	: 20	: 168	: 20
	:	:	:	:	:	:
Total	:	:	:	:	:	:
1986/87	:	:	: 722	: 109	: 4,258	: 671
1987/88	:	:	: 1,016	: 172	: 4,626	: 712
	:	:	:	:	:	:
Maximum absorbable	:	:	:	:	:	:
	:	:	:	:	:	:
Cereal equivalent	:	:	:	:	:	:
1986/87	:	:	: 722	: 109	: 2,657	: 442
1987/88	:	:	: 1,016	: 172	: 3,000	: 491
	:	:	:	:	:	:

## SUDAN

Sudan's bumper sorghum crop of 1986/87 is expected to exceed last year's 3.6 million tons and may reach 4 million tons. Sorghum producer prices in the main producing areas are the lowest in over 6 years; stocks are estimated at 600,000 tons. In addition, millet production in 1986/87 will exceed last year's crop by over 40 percent. Similar increases are expected for peanuts, sesame, and gum arabic, which together with cotton are major export earners. Foreign exchange earnings are projected to increase by 60 percent over 1985, when exports fell to only \$444 million. Sudan did not meet all its debt service payments in 1985 and estimates for 1986 and 1987 are based on historical payments, not debt service due.

Sudan's 1-million-ton grain surplus is almost all sorghum. Wheat imports in 1987 are projected at 700,000 tons, about the same as in 1986. The excellent sorghum harvests of the last 2 years have eliminated additional food needs, both status quo and nutrition-based. However, food shortages persist in some areas, especially in the south.

While agricultural recovery has begun, civil war problems continue, making relief work difficult in southern Sudan. Food relief needs remain in the south but their magnitude is unclear due to the lack of information. Emergency food programs are in operation.

### Sudan basic food data

Commodity/year	Actual or	Begin-				Per	1979-81	
	forecast	ning	Net	Nonfeed	Feed	capita	Commodity	Share
	production	stocks	imports	use	use	total use	coverage	of diet
		1,000 tons				Kilos		Percent
Major cereals								
1980/81	2,816	190	146	2,688	210	152	Wheat	8.0
1981/82	3,981	254	175	3,452	318	192	Rice	0.4
1982/83	2,453	640	182	2,780	198	146	Corn	0.8
1983/84	2,327	297	451	2,863	197	146	Sorghum	32.0
1984/85	1,392	15	1,610	2,777	90	133	Millet	9.6
1985/86	4,267	150	565	4,686	117	209	Peanuts	12.1
1986/87	4,697	179					Total	62.9
1987/88	3,797	179						
Peanuts								
1980/81	707	50	(41)	706	0	37		
1981/82	838	10	(100)	698	0	35		
1982/83	492	50	(70)	442	0	22		
1983/84	413	30	(45)	388	0	18		
1984/85	386	10	0	386	0	18		
1985/86	345	10	0	345	0	15		
1986/87	500	10						
1987/88	475	10						

## Import requirements for Sudan

Commodity/year	:	Production	Total use		Import requirements		
			Status	Nutrition-	Status	Nutrition-	
			quo	based	quo	based	Maximum
	:		<u>1,000 tons</u>				
Major cereals	:						
1986/87	:	4,697	3,692	4,147	(1,005)	(550)	711
1987/88	:	3,797	3,803	4,149	6	352	1,759
	:						
Peanuts	:						
1986/87	:	500	691	642	191	142	(0)
1987/88	:	475	712	638	237	163	(0)
	:						
Cereal equivalent	:						
1986/87	:	5,197	4,383	4,789	(814)	(408)	711
1987/88	:	4,272	4,515	4,787	243	515	1,759
	:						

## Financial indicators for Sudan, actual and projected

Year	:	Exports	Imports	Debt	Foreign exchange available		
		and other	and other	service	International:	Share to major	
		credits	debits		reserves	Total	food imports
	:						
	:	<u>Million dollars</u>					<u>Percent</u>
1980	:	689	1,127	104	49	585	8
1981	:	793	1,634	145	17	648	13
1982	:	401	750	115	21	286	33
1983	:	514	703	87	17	427	19
1984	:	519	600	107	17	412	23
1985	:	444	579	130	12	314	
	:						
1986	:	700	800	148	20	552	25
1987	:	650	950	137	20	509	25
	:						

# Additional food needs to support consumption for Sudan, with stock adjustment

Commodity/year	: Commercial import capacity :		Status quo		: Nutrition-based	
	: Quantity	: Value	: Quantity	: Value	: Quantity	: Value
	: <u>1,000 tons</u>	<u>Million \$</u>	<u>1,000 tons</u>	<u>Million \$</u>	<u>1,000 tons</u>	<u>Million \$</u>
Cereal equivalent	:					
Consumption	:					
1986/87	:	584	63	0	0	0
1987/88	:	563	58	0	0	0
	:					
Stock adjustment	:					
1986/87	:		122	13	122	13
1987/88	:		121	13	121	13
	:					
Total	:					
1986/87	:		0	0	0	0
1987/88	:		0	0	73	8
	:					

## Southern Africa

A severe food crisis continues in Mozambique, primarily because of war-related disruption and turmoil. Rural insurgency prevents normal cultivation and also restricts distribution of inputs and food. These conditions also hamper the collection of data on production, population movements, and other factors needed to accurately assess food deficits.

The region, as a whole, still has a corn surplus, led by Zimbabwe which currently has over 2 million tons in stock. Malawi's surplus is considerably smaller, while Zambia is hovering near self-sufficiency for the first time in recent years. Late collection of the 1986 crop and early rains in October and November may have reduced Zambia's corn supply. Zimbabwe is having difficulty exporting its corn and is discouraging its farmers from growing as much corn this year. Consequently, commercial producers will be paid the 1986 price of \$106 per ton, for only 50 percent of their 1986 delivery base, while additional deliveries will receive only \$59 a ton. Given favorable rains to date, and the late announcement of the price policy change, only a modest fall in production is anticipated.

Despite Mozambique's pressing needs, it will receive only a relatively small amount of regional grain, mostly from triangular transactions financed by donors. Weak logistics and severe financial constraints prevent larger flows.

To date, no major weather-related problems have occurred for the 1987/88 crop. Harvests generally begin in May, and the estimates of Southern Africa's additional needs for 1986/87 and 1987/88 are the same, at 510,000 tons. The locust threat is currently under control. The need for 1986/87 is down 11 percent from the November report because of a small reduction in Mozambique's needs estimate and reduction in the total use estimates for Lesotho and Malawi. Mozambique accounts for about 95 percent of the needs.

## Southern Africa basic food data

[illegible]



Southern Africa cereal use, additional food needs to support consumption, and stock adjustment

Commodity/year	: <u>Total use</u> :		: <u>Additional needs</u>			
	: <u>Status</u> : <u>Nutrition-</u>		: <u>Status quo</u> :		: <u>Nutrition-based</u>	
	: <u>quo</u> : <u>based</u>		: <u>Quantity</u> : <u>Value</u>		: <u>Quantity</u> : <u>Value</u>	
	: :		: :		: :	
	: <u>1,000 tons</u>	: <u>1,000 tons</u>	: <u>1,000 tons</u>	: <u>Million \$</u>	: <u>1,000 tons</u>	: <u>Million\$</u>
Cereal equivalent	:	:	:	:	:	:
Consumption	:	:	:	:	:	:
1986/87	: 9,968	: 11,627	: 510	: 74	: 1,744	: 250
1987/88	: 10,254	: 11,963	: 507	: 70	: 1,715	: 236
	:	:	:	:	:	:
Stock adjustment <sup>1/</sup>	:	:	:	:	:	:
1986/87	:	:	: 22	: 1	: 22	: 1
1987/88	:	:	: 41	: 5	: 41	: 5
	:	:	:	:	:	:
Total	:	:	:	:	:	:
1986/87	:	:	: 510	: 74	: 1,889	: 268
1987/88	:	:	: 507	: 70	: 1,720	: 237
	:	:	:	:	:	:
Maximum absorbable	:	:	:	:	:	:
	:	:	:	:	:	:
Cereal equivalent	:	:	:	:	:	:
1986/87	:	:	: 510	: 74	: 1,137	: 161
1987/88	:	:	: 507	: 70	: 974	: 135
	:	:	:	:	:	:

<sup>1/</sup> Stock adjustments are offset by negative needs for consumption.

Merchandise imports were sharply lower in 1985, and Lesotho's international reserves rose in 1986. As a result, commercial import capacity rose slightly to \$22 million, compared with the \$21 million estimated in the August report.

## Import requirements for Lesotho

30

# Financial indicators for Lesotho, actual and projected

Year	:	Exports	:	Imports	:	Debt	:		:	Foreign exchange available
	:	and other	:	and other	:	service	:	International:	:	Share to major
	:	credits	:	debits	:		:	reserves	:	Total : food imports
	:	----- Million dollars -----							:	Percent
1980	:	360	:	479	:	5	:	50	:	355 7
1981	:	382	:	513	:	4	:	43	:	378 8
1982	:	420	:	504	:	9	:	48	:	411 8
1983	:	468	:	549	:	21	:	67	:	447 7
1984	:	413	:	476	:	21	:	49	:	392 8
1985	:	324	:	371	:	18	:	44	:	306
1986	:	372	:	488	:	12	:	65	:	372 8
1987	:	379	:	530	:	12	:	50	:	359 8

## Additional food needs to support consumption for Lesotho

Commodity/year	:	: Commerical import capacity :		: Status quo :		: Nutrition-based	
	:	Quantity	: Value	: Quantity	: Value	: Quantity	: Value
	:	<u>1,000 tons</u>	<u>Million \$</u>	<u>1,000 tons</u>	<u>Million \$</u>	<u>1,000 tons</u>	<u>Million \$</u>
Cereal equivalent	:						
Consumption	:						
1986/87	:	175	22	0	0	57	7
1987/88	:	177	21	0	0	47	6
	:						
Stock adjustment	:						
1986/87	:			0	0	0	0
1987/88	:			0	0	0	0
	:						
Total	:						
1986/87	:			0	0	57	7
1987/88	:			0	0	47	6
	:						

## MOZAMBIQUE

Agricultural recovery prospects in Mozambique are dim because of the turmoil throughout the country. Midway through the growing season, rains have been generally sufficient for crops, but crop production faces other overwhelming constraints. In recent months, increased fighting has raised the number of Mozambiquan refugees moving into neighboring countries. The country's food deficit remains large, but is impossible to estimate precisely. Travel in much of the country is limited by the insurgency.

### Mozambique basic food data

Commodity/year								1979-81	
	Actual or	Begin-					Per	Commodity:	Share
	forecast	ning	Net	Nonfeed	Feed		capita	coverage	of diet
	production	stocks	imports	use	use		total use		
		1,000 tons					Kilos		Percent
Major cereals									
1980/81	538	0	409	947	0	78	Wheat	6.2	
1981/82	605	0	370	975	0	79	Rice	5.8	
1982/83	570	0	373	943	0	74	Corn	15.5	
1983/84	372	0	468	840	0	64	Sorghum	5.6	
1984/85	429	0	394	823	0	62	Millet	0.2	
1985/86	563	0	376	939	0	69	Cassava	39.7	
1986/87	563	0					Total	73.0	
1987/88	573	0							
Roots									
1980/81	2,800	0	0	2,800	0	231			
1981/82	2,850	0	0	2,850	0	230			
1982/83	2,900	0	0	2,900	0	228			
1983/84	2,300	0	0	2,300	0	177			
1984/85	2,600	0	0	2,600	0	196			
1985/86	2,800	0	0	2,800	0	205			
1986/87	2,900	0							
1987/88	3,000	0							

# Import requirements for Mozambique

Commodity/year	:	Production	Total use		Import requirements		
			Status	Nutrition-	Status	Nutrition-	
			quo	based	quo	based	Maximum
	:						
	:			1,000 tons			
Major cereals	:						
1986/87	:	563	1,053	1,350	490	787	608
1987/88	:	573	1,084	1,389	511	816	632
	:						
Roots	:						
1986/87	:	2,900	3,142	4,474	242	1,574	346
1987/88	:	3,000	3,234	4,606	234	1,606	341
	:						
Cereal equivalent	:						
1986/87	:	1,726	2,313	3,144	588	1,418	721
1987/88	:	1,776	2,381	3,236	605	1,460	743
	:						

## Financial indicators for Mozambique, actual and projected

Year	:	Exports	Imports	Debt	Foreign exchange available		
		and other	and other	service	International:	Share to major	
		credits	debits		reserves	Total	food imports
	:						
	:						
	:						
1980	:	448	870	91	268	357	19
1981	:	452	918	214	206	238	12
1982	:	394	971	226	71	168	26
1983	:	292	797	189	60	103	28
1984	:	210	690	165	72	45	78
1985	:	184	610	120	25	64	
	:						
1986	:	205	749	127	25	47	44
1987	:	265	900	164	25	59	44
	:						



Additional food needs to support consumption for Mozambique, and as constrained by maximum absorbable imports

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million \$	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent						
Consumption						
1986/87	105	15	482	69	1,313	187
1987/88	138	19	467	64	1,322	180
Stock adjustment						
1986/87			0	0	0	0
1987/88			0	0	0	0
Total						
1986/87			482	69	1,313	187
1987/88			467	64	1,322	180
Maximum absorbable						
Cereal equivalent						
1986/87			482	69	616	88
1987/88			467	64	605	82

## The Middle East

Additional status quo food needs for the Middle East region total 650,000 tons for 1986/87, a 44-percent increase over the August estimate. This is mainly an increase in Lebanon's needs which more than doubled to 351,000 tons. Low world prices account for some of the increased volume. Lebanon's foreign exchange reserves were cut in half in 1986 to an estimated \$530 million and with lower worker remittances and reduced payments from neighboring Arab countries, the exchange situation is unlikely to improve. In the Yemens, grain crops are in the ground and the food needs estimate remains unchanged.

## Middle East basic food data

Commodity/year	: Actual or : forecast : production	: Begin- : ning : stocks	: : Net : imports	: : Popula- : tion	: Per : capita : total : use
	:				
	:	<u>1,000 tons</u>		<u>Thousand</u>	<u>Kilos</u>
Major cereals	:				
1980/81	:	956	249	1,105	9,964 215
1981/82	:	945	170	1,322	10,135 223
1982/83	:	880	173	1,426	10,316 221
1983/84	:	488	203	1,441	10,514 192
1984/85	:	670	116	1,672	10,737 217
1985/86	:	813	131	1,674	11,001 226
1986/87	:	844	132		11,225
1987/88	:	874	132		11,454
	:				

Middle East cereal use, additional food needs to support consumption, and stock adjustment

Commodity/year	Total use		Additional needs			
	Status quo	Nutrition-based	Status quo	Nutrition-based		
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	1,000 tons	1,000 tons	Million \$	1,000 tons	Million\$
Cereal equivalent						
Consumption						
1986/87	2,456	2,280	650	94	473	68
1987/88	2,505	2,327	643	88	465	64
Stock adjustment						
1986/87			88	13	88	13
1987/88			37	6	37	6
Total						
1986/87			738	106	562	81
1987/88			680	94	502	70

## LEBANON

Lebanon's status quo additional food needs have doubled to 351,000 tons since the August report, a result of a substantial deterioration of the country's financial situation. Unending civil strife has been responsible for much destruction and loss of the country's productive capacity and for contributing--along with fiscal mismanagement--to monetary and financial disorder.

Lebanon's currency continues to depreciate against the dollar from LL5.49 in 1983, to LL18.4 in 1985 and LL51.42 at the end of October 1986. Currently, the inflation rate is about 75 percent, up from 25 percent in 1984. Three factors have contributed to the increasing inflation: money supply growth, lower real economic growth, and expectation of higher inflation.

Lebanon's foreign exchange reserves have fluctuated widely. From 1980 to 1984 (except for 1982), reserves fell from \$1.6 billion to \$672 million. In 1985, they increased to \$1.1 billion, but declined again to only \$556 million at the end of October 1986. The drop in foreign exchange reserves reflects a policy of government intervention to support the value of the Lebanese pound, government financing of imports (including arms), and reduced transfer payments.

## Lebanon basic food data

Commodity/year	Actual or forecast production	Begin- ning stocks	Net imports	Nonfeed use	Feed use	Per capita total use	1979-81 Commodity: Share coverage :of diet
		<u>1,000 tons</u>				<u>Kilos</u>	<u>Percent</u>
Major cereals							
1980/81	44	94	482	416	169	221 :Wheat	37.8
1981/82	33	35	546	348	214	214 :Rice	3.2
1982/83	29	52	569	396	197	227 :Corn	0.3
1983/84	29	57	591	416	210	241 :Barley	.0
1984/85	24	51	590	402	207	234 : Total	41.4
1985/86	21	56	592	417	200	234 :	
1986/87	23	52				:	
1987/88	24	52				:	

## Import requirements for Lebanon

Commodity/year	Production	Total use		Import requirements		Maximum
		Status quo	Nutrition-based	Status quo	Nutrition-based	
Cereal equivalent						
1986/87	23	610	547	587	524	700
1987/88	24	618	553	594	529	707

# Financial indicators for Lebanon, actual and projected

Year	:	Exports	:	Imports	:	Debt	:	Foreign exchange available	
	:	and other	:	and other	:	service	:	International:	Share to major
	:	credits	:	debits	:	reserves	:	Total	food imports
	:	----- Million dollars -----						Percent	
1980	:	3,851	:	3,184	:	13	:	1,588	3,839
1981	:	3,711	:	3,022	:	52	:	1,516	3,659
1982	:	3,269	:	3,909	:	65	:	2,608	3,204
1983	:	2,372	:	2,780	:	53	:	1,903	2,319
1984	:	1,940	:	2,600	:	53	:	672	1,887
1985	:	1,537	:	1,850	:	54	:	1,074	1,483
1986	:	1,350	:	1,850	:	28	:	530	813
1987	:	1,275	:	1,700	:	27	:	500	793

## Additional food needs to support consumption for Lebanon, with stock adjustment

Commodity/year	:	Commercial import capacity		:	Status quo		:	Nutrition-based	
	:	Quantity	:	Value	:	Quantity	:	Value	Quantity : Value
	:	<u>1,000 tons</u>	:	<u>Million \$</u>	:	<u>1,000 tons</u>	:	<u>Million \$</u>	<u>1,000 tons</u> <u>Million \$</u>
Cereal equivalent	:		:		:		:		
Consumption	:		:		:		:		
1986/87	:	237	:	30	:	351	:	44	287 36
1987/88	:	242	:	29	:	352	:	42	287 35
Stock adjustment	:		:		:		:		
1986/87	:		:		:	43	:	5	43 5
1987/88	:		:		:	1	:	0	1 0
Total	:		:		:		:		
1986/87	:		:		:	394	:	50	331 42
1987/88	:		:		:	353	:	42	288 35

South Asia

South Asian cereal production is estimated at 178.7 million tons in 1986/87, 2.5 percent below the earlier forecast, but still 2 percent above 1985/86 and marginally above the previous record. Smaller estimates of Indian coarse grain harvests because of dry weather account for the lower production estimate. India's 1986/87 cereal harvest is expected to be only marginally above 1985/86, but supplies remain more than adequate because of high government stocks. Pakistan's food grain output continues to be estimated at a record because of a bumper wheat harvest, although poor weather has resulted in a smaller estimate of the 1986/87 rice crop. Record food grain production continues to be forecast in Bangladesh on the strength of a bumper main rice crop. Revised estimates indicate that the setback in rice production in Sri Lanka is substantially smaller than forecast earlier, but production is still below trend. USDA and FAO assessments of food grain harvest losses in Nepal indicate a 1986/87 crop of 3.03 million tons, 7.4 percent below 1985/86 and close to the earlier forecast of 3.07 million tons.

The outlook for edible oil production in the region in 1986/87 has changed only marginally from the previous assessment, with a somewhat smaller increase expected in India and small declines expected in Pakistan and Sri Lanka. Estimates of regional pulse production are higher than earlier forecasts based on larger Indian harvests.

South Asian status quo cereal import needs to support consumption are estimated at 3.4 million tons, compared with the previous estimate of 3.6 million, with reduced needs in Bangladesh and Sri Lanka accounting for the decline. Nutrition-based import needs, primarily reflecting smaller Indian coarse grain harvests, have increased to 16.5 million tons, indicating the wide nutritional gap that persists in most countries in the region, particularly Nepal and Bangladesh. Both status quo and nutrition-based edible oil import requirements are up marginally from the previous assessment because of lower production estimates for India, while a higher estimate of Indian pulse production has reduced estimated regional pulse import needs to zero.

The balance of payments outlook for the region remains consistent with earlier forecasts. The commercial food import capacity of countries in the region remains constrained by weak export performance, slowing remittances, and steadily rising debt service obligations. While both India and Pakistan are likely to have adequate commercial import capacity to meet food import requirements, the financial condition of Bangladesh, Sri Lanka, and Nepal remains fragile. Debt incurred in large commercial food grain purchases in 1984 and 1985 now strains Bangladesh's balance of payments, while Sri Lanka's commercial import capacity will be reduced substantially by falling export earnings and rapid growth in debt service payments. Nepal's small exports, coupled with high transport and distribution costs, result in negligible commercial import capacity, even under emergency conditions.

Status quo additional cereal needs in the region total 1.31 million tons, down from the previous estimate of 1.42 million because of small declines in estimated needs in Bangladesh and Sri Lanka. However, as reported previously, the region's



status quo additional cereal needs might be better assessed at about 1.6 million tons because Bangladesh's weak financial position may require smaller outlays for commercial purchases. Additional needs for stockbuilding are now estimated at only 22,000 tons because of reduced needs in Bangladesh, and with Sri Lanka required to reduce stocks to meet some of its production shortfall. South Asian nutrition-based additional cereal needs to support consumption have increased from 4.5 million tons to 7.2 million, with India accounting for all of the increase. Maximum absorbable nutrition-based additional cereal needs are estimated at 3.4 million tons, up from the previous estimate of 2.2 million, with Bangladesh, India, and Nepal accounting for the bulk of the total and India accounting for all of the increase. The region's status quo and nutrition-based additional needs for pulses and edible oil continue to be estimated at zero.

## South Asia basic food data

South Asia cereal use, additional food needs to support consumption, and stock adjustment

Commodity/year	Total Use		Additional needs			
	Status	Nutrition-	Status quo	Nutrition-based		
	quo	based	Quantity	Value	Quantity	Value
	:	:	:	:	:	:
	1,000 tons	1,000 tons	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent						
Consumption						
1986/87	180,332	195,017	1,284	199	7,247	1,072
1987/88	184,241	199,665	642	99	4,005	572
Stock adjustment						
1986/87			22	4	116	18
1987/88			95	12	95	12
Total cereal equivalent						
1986/87			1,306	203	7,363	1,089
1987/88			736	111	4,099	584
Maximum absorbable						
Cereal equivalent						
1986/87			1,306	203	3,375	502
1987/88			736	111	1,428	204

## BANGLADESH

Food grain production is estimated at 16.95 million tons in 1986/87, marginally below the earlier forecast but still more than 5 percent above the previous record. The 1986/87 rice harvest, aided by good weather for the main (aman) crop, is estimated at a record 15.65 million tons. The 1987 wheat crop is forecast 1.3 million tons, down from the previous forecast of 1.5 million, primarily because the record aman rice harvest is likely to delay and reduce incentives for wheat sowing. Final revisions of 1985/86 food grain production, trade, consumption, and stock data have resulted in lower estimates of production, imports, and consumption, and a higher estimate of government stocks. Government food grain stocks at the beginning of 1986/87 are placed at 976,000 tons, about 70,000 tons higher than the previous estimate, but still below the informal government target of 1.2 million tons. The forecast of domestic edible oil supplies is unchanged, with production forecast at 58,000 tons and stocks estimated at a record 157,000 tons, primarily because of abnormally large imports of low-priced palm oil in 1985/86.

Status quo and nutrition-based estimates of cereal import needs to support consumption of 1.8 million tons and 5.0 million tons, respectively, are near the previous assessments and indicate a wide gap between status quo per capita consumption and that needed to achieve the FAO/WHO recommended level of caloric intake. Capacity to absorb cereal imports is estimated at 2.7 million tons. Larger carryin stocks have resulted in a smaller estimate of import needs to support stock building of about 80,000 tons. Edible oil import needs are unchanged from the previous assessment.

Bangladesh's estimated capacity to import cereals and edible oils commercially has increased marginally from the previous assessment, primarily because of revisions in historical data. However, Bangladesh's balance of payments outlook continues to be very tight because of poor prospects for growth in exports and remittances, and rising debt service payments stemming primarily from large commercial food grain purchases in 1984/85. Standard calculations continue to indicate commercial food grain import capacity of about 1.2 million tons (\$180 million) but, as reported previously, this estimate is inflated by the large commercial outlays in 1984/85 and import capacity may be better assessed at about \$120 million (820,000 tons).

Status quo additional food needs for 1986/87 are placed at 557,000 tons (478,000 tons for consumption and 79,000 for stocks) compared with the earlier additional needs estimate which totaled 811,000 tons. However, using the lower import capacity assessment (\$120 million), 1986/87 status quo additional cereal needs total about 940,000 tons. Maximum absorbable nutrition-based additional cereal import needs, including imports for stockbuilding, are estimated at 1.4 million tons using the standard import capacity calculation, and about 1.8 million using the alternate calculation. Both status quo and nutrition-based additional needs in the form of edible oils continue to be estimated at zero in 1986/87 because of high stocks, and because low world prices allow adequate imports to be purchased commercially.

# Bangladesh basic food data

Commodity/year	Actual or	Begin-	Net	Nonfeed	Feed	Per	1979-81	
	forecast	ning	imports	use	use	capita	Commodity:	Share
	production	stocks				total use	coverage	of diet
	-----1,000 tons-----					Kilos		Percent
Major cereals								
1980/81	14,975	787	1,077	15,587	0	177	Wheat	8.8
1981/82	14,598	1,252	1,235	16,470	0	182	Rice	76.3
1982/83	15,311	615	1,817	17,117	0	183	Vegetable	
1983/84	15,710	626	2,056	17,592	0	183	oil	2.2
1984/85	16,084	800	2,588	18,455	0	188	Total	87.3
1985/86	16,081	1,017	1,203	17,325	0	172		
1986/87	16,950	976						
1987/88	17,550	976						
Vegetable oils								
1980/81	56	18	140	161	0	2		
1981/82	54	53	144	200	0	2		
1982/83	55	51	164	207	0	2		
1983/84	57	63	152	193	0	2		
1984/85	57	79	230	233	0	2		
1985/86	57	133	275	308	0	3		
1986/87	58	157						
1987/88	58	157						

## Import requirements for Bangladesh

Commodity/year	Production	Total use		Import requirements			
		Status	Nutrition-	Status	Nutrition-		
		quo	based	quo	based	Maximum	
		-----1,000 tons-----					
Cereals							
1986/87	16,950	18,729	21,903	1,779	4,953	2,720	
1987/88	17,550	19,146	22,411	1,596	4,861	2,552	
Vegetable oils							
1986/87	58	227	204	169	146	258	
1987/88	58	232	209	174	151	265	

# Financial indicators for Bangladesh, actual and projected

Year	:	Exports	:	Imports	:	Debt	:	International	:	Foreign exchange available
	:	and other	:		:	service	:	reserves	:	Share to major
	:	credits	:		:		:		:	food imports
	:	----- Million dollars -----						----- Percent -----		
1980	:	1,364	:	2,795	:	125	:	249	:	1,239 13
1981	:	1,299	:	2,890	:	170	:	108	:	1,129 15
1982	:	1,545	:	2,651	:	260	:	350	:	1,285 21
1983	:	1,717	:	2,728	:	193	:	539	:	1,524 16
1984	:	1,721	:	2,989	:	227	:	404	:	1,494 25
1985	:	1,759	:	2,879	:	214	:	362	:	1,479
1986	:	1,794	:	2,967	:	324	:	395	:	1,428 20
1987	:	1,978	:	3,282	:	335	:	405	:	1,565 20



Additional food needs to support consumption for Bangladesh, with stock adjustment and as constrained by maximum absorbable imports

Commodity/year	Commercial import capacity :		Status quo :		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million \$	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent						
Consumption						
1986/87	1,229	180	478	70	3,590	525
1987/88	1,410	197	99	14	3,293	460
Stock adjustment						
1986/87			79	12	79	12
1987/88			23	3	23	3
Total						
1986/87			557	81	3,669	536
1987/88			122	17	3,316	463
Vegetable oils						
1986/87	196	78	0	0	0	0
1987/88	203	86	0	0	0	0
Total						
1986/87		258		81		536
1987/88		282		17		463
Maximum absorbable						
Cereal equivalent						
1986/87			557	81	1,435	210
1987/88			122	17	1,007	140
Vegetable oils						
1986/87			0	0	0	0
1987/88			0	0	0	0
Total						
1986/87				81		210
1987/88				17		140

## NEPAL

On September 9, 1986, the Government of Nepal announced that it anticipated a substantial food shortage in 1986/87 due to declines in paddy and corn production, and formally requested food aid. Nepal's 1986/87 crops suffered from poor distribution of rainfall, including a drought in parts of the eastern and western Tarai (plains). The country also suffers from chronically poor distribution of food grain supply and effective demand. Most cereal production occurs in the Tarai, while a majority of the population lives in the hills. However, hill incomes are too low, and the transport costs too high, to allow production in the Tarai to make up for food deficits in the hills. Per capita disappearance has been stagnant at a level well below the FAO recommended minimum.

Rice supplies half the calories in the Nepali diet, and the rice crop was hit hardest by the drought in the Tarai in 1986. The 1986 rice crop is now estimated at 1.6 million tons, down more than 13 percent from the previous year's record. The corn crop is likely to fall to 830,000 tons because of damage from heavy rain. The 1985/86 wheat crop is about 590,000 tons. Wheat harvested in the spring and summer of 1987 will primarily affect food availabilities and additional food needs for 1987/88 and not 1986/87.

These estimates are based on the analyses of USDA and FAO assessment teams that visited Nepal in November and December 1986. They found that a significant, although somewhat untimely, amount of rain had fallen after the initial requests for food aid in September. This rainfall helped revive the rice crop in some areas. Where rice crops were lost, wheat will be planted earlier, which should result in higher yields. A significant amount of untimely rain also fell in December (after the teams' departures), brightening further the prospects for the 1986/87 wheat crop, but casting some uncertainty over the successful completion of the current rice harvest.

Status quo calculations indicate an import requirement\* of 280,000 tons to support consumption and an additional food need of 214,000 tons. The additional food need calculation allocates the historically highest share of available foreign exchange to food imports because of the serious decline in production. Historical data on cereal stocks are not available, but the Nepal Food Corporation's current small stocks are fully committed to supplying deficit areas in the hills. Nutrition-based estimates, reflecting the large gap between status quo per capita consumption and the FAO recommended minimum, put additional cereal needs at about 700,000 tons.

Nepal's financial situation is extremely weak. Most of its merchandise exports go to India, earning no convertible currency, and its trade balance is typically in deficit. Virtually all imports of food grains would have to be on a highly concessional basis. Even so, Nepal may not be able to absorb 280,000 tons of cereal imports. The country's landlocked position, limited road network and lack of railroads, and weak local administration make delivering and distributing food aid a very difficult proposition. The FAO team reported that about 20,000 tons of food assistance and 10,000 tons of commercial imports were in the pipeline.

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\* Readers should note that in the 1986/87 annual report published in August 1986, the Nepal import requirement table did not show the correct figures. Other tables for Nepal were correct.

# Nepal basic food data

Commodity/year	1979-81							Commodity	Share of diet
	Actual or forecast	Beginning	Net imports	Nonfeed use	Feed use	Per capita	total use		
	production	stocks	imports	use	use	total use	coverage		
	-----1,000 tons-----					Kilos			Percent
Major cereals									
1980/81	2,824	0	(26)	2,798	0	187	Wheat		10.9
1981/82	2,934	0	(42)	2,892	0	188	Rice		49.5
1982/83	2,465	0	83	2,548	0	162	Corn		19.6
1983/84	3,254	0	(16)	3,238	0	200	Total		80.0
1984/85	3,258	0	(49)	3,209	0	194			
1985/86	3,275	0	(25)	3,250	0	191			
1986/87	3,033	0							
1987/88	3,410	0							

## Import requirements for Nepal

Commodity/year	Production	Total use		Import requirements		
		Status quo	Nutrition-based	Status quo	Nutrition-based	Maximum
		-----1,000 tons-----				
Cereal equivalent						
1986/87	3,033	3,313	3,800	280	767	462
1987/88	3,410	3,399	3,947	(11)	537	176

# Financial indicators for Nepal, actual and projected

Year	:	:	:	Debt	:	:	Foreign exchange available
	:	Exports	:	Imports	:	service : International:	: Share to major
	:	:	:	:	:	reserves	: Total : food imports
	:	----- Million dollars -----					Percent
1980	:	333	:	446	:	4	196
1981	:	315	:	450	:	5	233
1982	:	290	:	522	:	7	163
1983	:	332	:	506	:	12	123
1984	:	343	:	507	:	17	68
1985	:	377	:	570	:	13	104
	:		:		:		364
1986	:	409	:	655	:	29	136
1987	:	454	:	725	:	33	163
	:		:		:		426
	:		:		:		2
	:		:		:		2

Additional food needs to support consumption for Nepal, with stock adjustment and as constrained by maximum absorbable imports

Commodity/year	:	Commercial import capacity		Status quo		Nutrition-based	
	:	Quantity	Value	Quantity	Value	Quantity	Value
	:	1,000 tons	Million \$	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent	:						
Consumption	:						
1986/87	:	66	11	214	36	701	118
1987/88	:	29	5	0	0	508	81
	:						
Stock adjustment	:						
1986/87	:			0	0	0	0
1987/88	:			0	0	0	0
	:						
Total	:						
1986/87	:			214	36	701	118
1987/88	:			0	0	508	81
	:						
Maximum absorbable	:						
	:						
Cereal equivalent	:						
1986/87	:			214	36	396	66
1987/88	:			0	0	147	23
	:						

Estimated 1986/87 cereal production in the region has been lowered slightly to 53.8 million tons, reflecting reduced Indonesian rice plantings. For the first time since the 1970's, the Indonesian Government promoted alternative crops and did not increase the floor price for rice, causing rice output to drop about 1 percent from 1985/86. Cereal production estimates for the rest of the region are unchanged, including estimates for record rice harvests in the Philippines and Vietnam.

The 1986/87 regional status quo import requirement is estimated at 2.5 million tons for cereals, up 500,000 tons from the earlier projection, with Vietnam accounting for all of the increase. Vietnam's estimated import needs are higher because of upward revisions in historical rice consumption data that have increased estimated status quo per capita consumption about 5 percent and import requirements more than 50 percent to 1.1 million tons. The Philippines and Vietnam account for about 90 percent of the region's total status quo import requirements, with Cambodia accounting for the remainder. To close the nutritional gap, 1986/87 import requirements are estimated at 3.0 million tons.

The balance of payments outlook for countries in the region continues to be tight. However, current 1986 and 1987 estimates suggest an improved trade balance in the Philippines and Vietnam, as well as lower debt service obligations in Vietnam and Laos. The Philippines' current account in 1986 benefited from an increase in nontraditional exports, a temporary surge in remittances following the February change in government, the October IMF standby agreement of \$300 million, and another contraction of imports. The devaluation of the Vietnamese dong is expected to stimulate exports, while rescheduling has eased their debt burden substantially. Indonesia continues to adjust to lower oil prices and export revenues by shrinking imports and devaluing its currency, while meeting growing but manageable debt service obligations.

During 1986/87, Cambodia is estimated to account for all the region's additional needs, with status quo additional needs estimated at 132,000 tons and nutrition-based additional needs at about 317,000 tons. The Philippines' commercial import capacity is expected to be adequate to meet all of its cereal import requirements according to both estimates, assuming that debt rescheduling is negotiated in 1987. However, if debt rescheduling does not occur, the Philippines' additional needs could be substantial.

Assuming average weather, the region's cereal output is projected to expand to about 54.1 million tons in 1987/88, about 2.5 percent less than projected earlier. The downward revision reflects the expectation that Indonesian rice farmers will switch to lower-yielding, more pest-resistant rice varieties in reaction to an outbreak of brown-plant hopper late in 1986. As in 1986/87, the Philippines, Cambodia, and Vietnam are projected to account for all of the region's status quo and nutrition-based import requirements, estimated at 2.7 million tons and 3.2 million tons, respectively. Additional food needs are expected to continue to be confined to Cambodia in 1987/88 and remain near those estimated for 1986/87.



# Southeast Asia basic food data

Commodity	: Actual or : forecast : production :	: Begin- : ning : stocks :	: Net : imports :	: Popula- : tion :	: Per : capita : total : use
	: -----1,000 tons-----			Thousand	Kilos
Major cereals					
1980/81	: 42,590	2,891	5,538	260,707	181
1981/82	: 46,585	3,858	4,011	266,846	188
1982/83	: 45,867	4,381	4,058	272,908	185
1983/84	: 49,912	3,683	4,956	278,935	198
1984/85	: 52,227	3,452	4,292	285,228	194
1985/86	: 52,350	4,676	3,234	291,763	192
1986/87	: 53,780	4,333		298,448	
1987/88	: 54,060	4,333		305,267	

## Southeast Asia cereal use, additional needs to support consumption, and stock adjustment

Commodity/year	Total Use		Additional needs			
	: Status : quo	: Nutrition- : based	: Status quo : Quantity	: Value	: Nutrition-based : Quantity	: Value
	: 1,000 tons	: 1,000 tons	: 1,000 tons	: Million \$	: 1,000 tons	: Million \$
Cereal equivalent						
Consumption						
1986/87	: 62,128	59,886	132	24	317	59
1987/88	: 63,542	61,197	132	23	321	57



## Central America

The Central American countries continue to have extremely tight balance of payment situations in spite of debt rescheduling. This fragile balance of payments position further constrains the commercial import capacity. Growth in export earnings is also expected to remain low.

Status quo additional food needs to support both consumption and stock building in the region are estimated at 444,000 tons of cereals in 1986/87. Nutrition-based additional food needs are estimated at about 640,000 tons of cereal.

## Central America basic food data

Commodity/year	: Actual or : cast : production :	: Begin- : ning : stocks :	: : Net : imports :	: : Popula- : tion :	: Per : capita : total : use
	:	:	:	:	:
	:	-----1,000 tons-----		Thousand	Kilos
Major cereals	:				
1980/81	:	2,456	405	708	20,344 156
1981/82	:	2,670	390	502	20,759 159
1982/83	:	2,518	334	661	21,327 157
1983/84	:	2,656	324	677	21,905 161
1984/85	:	2,840	386	612	22,547 164
1985/86	:	2,789	493	672	23,230 171
1986/87	:	2,708	485		23,912
1987/88	:	2,860	485		24,614
	:				

Central America cereal use, additional food needs to support consumption, and stock adjustment

Commodity/year	Total Use		Additional needs			
	Status	Nutrition-	Status quo		Nutrition-based	
	quo	based	Quantity	Value	Quantity	Value
	:	:	:	:	:	:
	1,000 tons	1,000 tons	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent						
Consumption						
1986/87	3,604	3,761	379	64	564	83
1987/88	3,710	3,863	361	55	464	62
Stock adjustment						
1986/87			77	13	77	13
1987/88			20	4	25	4
Total						
1986/87			444	75	640	95
1987/88			378	58	478	64
Maximum absorbable						
Cereal equivalent						
1986/87			444	75	622	93
1987/88			378	58	478	64

## South America

Foreign debt problems continue, particularly in Bolivia and Peru, which have foregone debt repayment in recent years. Bolivia, Peru, and Ecuador have declining export earnings because of falling petroleum prices, which preclude use of petroleum exports as a source of revenue for debt repayment. All, however, are enjoying windfall export earnings from coffee in 1986.

All countries except Bolivia are realizing some economic growth. Reduced corn production estimates for 1986 give Bolivia status quo food needs of 19,000 tons in 1986/87. Because of the chronic shortage of calories, however, additional nutrition-based needs in the region, including those required for stock adjustments, total 243,000 tons in 1986/87 and 129,000 in 1987/88. Nearly all of the nutrition-based food needs are in Bolivia.

Preliminary reports are that Peru may have had a very large growth in real GDP in 1986 (8 to 9 percent). The El Nino phenomenon occurred in December, 1986 and January 1987, but not to the extent of the disaster in 1983. The full effect of El Nino on this region's crop production is not yet known.

### South America basic food data

Commodity/year	: Actual or : forecast : production :	: Begin- : ning : stocks :	: Net : imports :	: Popula- : tion :	: Per : capita : total : use
	: : -----1,000 tons-----			Thousand	Kilos
Major cereals	:				
1980/81	: 3,898	1,016	2,589	55,803	116
1981/82	: 4,452	1,056	2,552	57,032	122
1982/83	: 4,536	1,099	2,496	58,319	122
1983/84	: 4,094	1,037	2,889	59,657	120
1984/85	: 4,779	864	2,377	61,046	114
1985/86	: 4,540	1,047	2,679	62,486	114
1986/87	: 4,669	1,081		63,955	
1987/88	: 4,665	1,081		65,460	
	:				



South America cereal use, additional food needs to support consumption, and stock adjustment

Commodity/year	Total Use		Additional needs			
	Status	Nutrition-	Status quo		Nutrition-based	
	quo	based	Quantity	Value	Quantity	Value
	:	:	:	:	:	:
	1,000 tons	1,000 tons	1,000 tons	Million \$	1,000 tons	Million \$
Major cereals						
Consumption						
1986/87	10,278	10,305	9	1	215	28
1987/88	10,521	10,526	0	0	126	16
Stock adjustment						
1986/87			60	8	98	14
1987/88			26	3	26	3
Total						
1986/87			19	3	243	32
1987/88			0	0	128	16
Maximum absorbable						
Cereal equivalent						
1986/87			19	3	157	21
1987/88			0	0	36	4

## BOLIVIA

Slight reductions are reported in 1985/86 wheat and rice production. Increased reported imports of wheat in 1983/84-85/86, are offset somewhat by increased corn exports and ending wheat stocks in 1985/86. The result is decreased estimated total use from 1.22 million tons grain equivalent to 1.18 million. Corn production estimates for 1986/87 are reduced, bringing major cereals production to 667,000 tons from the earlier estimated 730,000. Whereas Bolivia had no assessed status quo needs in the initial assessment for 1986/87, the need is now 19,000 tons.

## Bolivia basic food data

	: Actual or	: Begin-	:	:	:	: Per	: 1979-81	
Commodity/year	: forecast	: ning	: Net	: Nonfeed	: Feed	: capita	: Commodity:	: Share
	: production	: stocks	: imports:	: use	: use	: total use :	: coverage :	: of diet
	:	:	:	:	:	:	:	:
	:	:-----1,000 tons	:	:	:	Kilos	:	Percent
Major cereals	:	:	:	:	:	:	:	:
1980/81	:	509	77	261	529	225	141 :Wheat	21.5
1981/82	:	642	93	151	461	360	150 :Rice	5.2
1982/83	:	576	65	210	450	360	144 :Corn	13.3
1983/84	:	458	41	375	541	310	148 :Cassava	3.7
1984/85	:	694	23	264	520	410	158 :Potatoes	8.2
1985/86	:	735	51	290	537	470	167 : Total	51.8
1986/87	:	667	69				:	
1987/88	:	735	69				:	
	:	:	:	:	:	:	:	:
Roots	:	:	:	:	:	:	:	:
1980/81	:	1,006	0	0	1,006	0	188 :	
1981/82	:	1,180	0	0	1,180	0	215 :	
1982/83	:	1,124	0	0	1,124	0	200 :	
1983/84	:	457	0	0	457	0	80 :	
1984/85	:	883	0	0	883	0	150 :	
1985/86	:	936	0	0	936	0	155 :	
1986/87	:	892	0				:	
1987/88	:	1,020	0				:	
	:	:	:	:	:	:	:	:

## Import requirements for Bolivia

Commodity/year	:	Production	Total use		Import requirements		
			Status	Nutrition-	Status	Nutrition-	
			quo	based	quo	based	Maximum
	:						
	:						
	:						
	:						
Major cereals	:						
1986/87	:	667	886	1,083	219	416	388
1987/88	:	735	907	1,111	172	376	345
	:						
Roots	:						
1986/87	:	892	1,109	1,143	217	251	436
1987/88	:	1,020	1,136	1,208	116	188	340
	:						
Cereal Equivalent	:						
1986/87	:	907	1,182	1,387	275	481	404
1987/88	:	1,006	1,210	1,433	203	426	336
	:						

### Financial indicators for Bolivia, actual and projected

Year	:	Exports	:	Imports	:	Debt	:	Foreign exchange available				
	:	and other	:	and other	:	service	:	International:	:	Share to major		
	:	credits	:	debits	:		:	reserves	:	Total	:	food imports
	:	----- Million dollars -----							Percent			
1980	:	1,058	:	1,232	:	280	:	106	:	778	:	5
1981	:	1,028	:	1,354	:	281	:	100	:	747	:	9
1982	:	921	:	1,059	:	287	:	156	:	634	:	8
1983	:	882	:	1,138	:	282	:	160	:	600	:	9
1984	:	837	:	1,104	:	320	:	252	:	517	:	10
1985	:	813	:	1,099	:	214	:	200	:	598	:	
	:		:		:		:		:		:	
1986	:	764	:	1,102	:	246	:	200	:	526	:	9
1987	:	825	:	1,098	:	265	:	200	:	568	:	9
	:		:		:		:		:		:	

# Additional food needs to support consumption for Bolivia, with stock adjustment

Commodity/year	Commercial import capacity		Status quo		Nutrition-based	
	Quantity	Value	Quantity	Value	Quantity	Value
	1,000 tons	Million \$	1,000 tons	Million \$	1,000 tons	Million \$
Cereal equivalent						
Consumption						
1986/87	265	35	9	1	215	28
1987/88	300	38	0	0	126	16
Stock adjustment						
1986/87			10	1	10	1
1987/88			2	0	2	0
Total						
1986/87			19	3	225	30
1987/88			0	0	128	16
Maximum absorbable						
Cereal equivalent						
1986/87			19	3	139	18
1987/88			0	0	36	4

Nutrition-based needs are now reduced to 17,000 from 65,000 tons assessed in August 1986.

Commodity/year	: Actual or forecast production :	: Begin- ning : stocks :	: Net : imports:	: Nonfeed : use :	: Feed : use :	: Per : capita : total use :	: 1979-81 Commodity: Share coverage :of diet
	:	: -----1,000 tons	:	:	Kilos	:	Percent
Major cereals	:	:	:	:	:	:	:
1980/81	:	453	71	322	524	171	87 :Wheat 9.9
1981/82	:	533	151	254	575	197	94 :Rice 12.7
1982/83	:	468	166	285	590	207	94 :Corn 1.4
1983/84	:	429	122	368	579	241	94 :Potatoes 3.2
1984/85	:	577	74	345	636	238	98 :Cassava 2.8
1985/86	:	528	120	434	636	255	97 :Plantains 5.4
1986/87	:	663	129				:Milk 7.9
1987/88	:	595	129				: Total 43.2
Roots	:	:	:	:	:	:	:
1980/81	:	1,246	0	0	1,246	0	156 :
1981/82	:	1,324	0	20	1,344	0	164 :
1982/83	:	1,453	0	0	1,453	0	172 :
1983/84	:	1,484	0	0	1,484	0	171 :
1984/85	:	1,456	0	0	1,456	0	163 :
1985/86	:	1,424	0	0	1,424	0	155 :
1986/87	:	1,482	0				:
1987/88	:	1,480	0				:
Milk	:	:	:	:	:	:	:
1980/81	:	758	0	9	767	0	96 :
1981/82	:	765	0	10	775	0	97 :
1982/83	:	893	0	12	905	0	113 :
1983/84	:	931	0	15	946	0	118 :
1984/85	:	946	0	0	946	0	118 :
1985/86	:	987	0	0	987	0	123 :
1986/87	:	1,000	0				:
1987/88	:	1,000	0				:



## Import requirements for Ecuador

Commodity/year	:	Production	Total use		Import requirements		
			Status	Nutrition-	Status	Nutrition-	
			quo	based	quo	based	Maximum
	:		-----1,000 tons-----				
Major cereals	:						
1986/87	:	663	906	930	243	267	306
1987/88	:	595	932	943	337	348	399
	:						
Roots	:						
1986/87	:	1,482	1,542	1,626	60	144	340
1987/88	:	1,480	1,585	1,658	105	178	393
	:						
Cereal equivalent	:						
1986/87	:	1,093	1,354	1,402	261	309	335
1987/88	:	1,025	1,392	1,425	367	400	442
	:						
Milk	:						
1986/87	:	1,000	998	1,006	(2)	6	4
1987/88	:	1,000	1,001	1,009	1	9	7

## Financial indicators for Ecuador, actual and projected

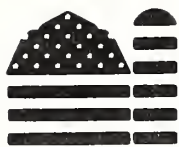
Year	:	Exports	Imports	Debt	Foreign exchange available		
		and other	and other	service	International:	Share to major	
		credits	debits	:	reserves	Total	food imports
	:	----- Million dollars -----					<u>Percent</u>
1980	:	2,975	3,647	559	1,013	2,416	6
1981	:	3,000	4,027	922	632	2,078	6
1982	:	2,734	3,949	1,107	304	1,627	8
1983	:	2,688	2,816	529	645	2,159	6
1984	:	2,972	3,240	991	611	1,981	6
1985	:	3,260	3,370	939	718	2,321	
	:						
1986	:	2,834	3,317	1,693	570	1,146	7
1987	:	3,166	3,494	1,544	550	1,577	7

# Additional food needs to support consumption for Ecuador, with stock adjustment

Commodity/year	: Commercial import capacity :		Status quo		: Nutrition-based	
	: Quantity	: Value	: Quantity	: Value	: Quantity	: Value
	: <u>1,000 tons</u>	<u>Million \$</u>	<u>1,000 tons</u>	<u>Million \$</u>	<u>1,000 tons</u>	<u>Million \$</u>
Cereal equivalent	:					
Consumption	:					
1986/87	:	329	52	0	0	0
1987/88	:	475	72	0	0	0
Stock adjustment	:					
1986/87	:		0	0	38	6
1987/88	:		0	0	0	0
Total	:					
1986/87	:		0	0	17	3
1987/88	:		0	0	0	0
Milk	:					
1986/87	:	3	4	0	1	2
1987/88	:	4	5	0	0	0
Total	:					
1986/87	:	56		0		5
1987/88	:	77		0		0
Maximum absorbable	:					
Cereal equivalent	:					
1986/87	:		0	0	17	3
1987/88	:		0	0	0	0
Milk	:					
1986/87	:		0	0	0	0
1987/88	:		0	0	0	0
Total	:					
1986/87	:			0		3
1987/88	:			0		0

## Glossary of terms

Status quo	A measure of per capita food availability in recent years
Nutrition-based	Per capita food availability sufficient to meet internationally accepted minimum caloric standards
Cereal equivalent	Cereal required to meet both cereal shortfalls and cereal equivalent (caloric basis) shortfalls in roots and tubers
Import requirement	Imports necessary to achieve either status quo or nutrition-based food availability, including both commercial and concessional food shipments
Tons	Metric tons
Dollars	U.S. dollars unless otherwise specified
GNP	Gross national product
GDP	Gross domestic product



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